

Utah Image and Awareness: The Post-Olympics European Study, 2002

**France, Germany, Italy,
United Kingdom, Holland**

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Study Objectives

- **This *2002 Post-Olympic European Survey* is the follow-up study of the Utah Travel Council's research which was commissioned in 1999. Both studies focus on Europeans' awareness and knowledge of the American West and state of Utah. The 2002 study also surveys respondents on their travel intentions to the American West, and Utah for the coming two years.**
- **Results of the 2002 Post-Olympic study will be compared with the *1999 European Survey*, and provide the UTC with a carefully matched set of longitudinal data to help in their assessment of the impact of the Winter Olympic Games on awareness, interest, and travel intentions of Europeans regarding the State of Utah. The data sets will also allow for comparison with similar survey data collected in the USA on the state of Utah. This longitudinal study will provide a useful perspective for assessing the state's efforts in meeting specific long-term tourism objectives.**
- **Results of both surveys will aid in developing specific promotional messages and objectives to targeted groups in Europe for Utah tourism. Combined with the qualitative study in Europe in '97-'98 and an additional study on the channel structure of European tourism done in '98-'99, this longitudinal survey data base further establishes the UTC as the state's leading expert on how Utah is viewed by potential tourists in Europe.**

Methodology

- **Research objectives, Questionnaire development and pre-testing with UTC management, and independent readers. Careful attention given to matching of measures in the 2002 survey with the 1999 study.**
- **Questionnaire translation by native speakers in country of survey. Telephone survey work in the United Kingdom, France, Germany, Italy, and The Netherlands.**
- **National telephone survey in all geographic regions of each country, at differing times of days, 7 days per week. Listed telephones only. Respondent minimum age of 18 years. Quota sampling on urban/rural regions, and gender.**
- **3 callbacks before recorded as not-at-home or non-response.**
- **Data gathered in all countries during September-early November, 2003.**
- **All country managers have survey experience in Europe, and Ph.D's in marketing or statistics.**

Study Caveats

- **Non-response rates and refusals to participate in the survey varied from country to country, and by region of calling. Greatest calling efforts were required in metropolitan London area . In general, a greater refusal and non-response rate in 2002, relative to 1999.**
- **The questions asked in the survey do not allow for an assessment of the potential biases in responses due to political and economic events in late 2002. Measures of *intentions* to travel to the American West should be assessed within the context of current political and economic events.**

Data Analysis

- **Europeans' general knowledge of the American West (aided and unaided, 1999/2002).**
- **Europeans' specific knowledge of Winter Olympic Game's host state (1999/2002).**
- **Europeans' specific knowledge of Winter Olympic Game's host city (1999/2002).**
- **Media behaviors of Europeans during the 2002 Winter Olympic Games.**
- **Specific images of the state of Utah (aided and unaided).**
- **Travel intentions to the American West in the next two years (total sample, and “top-liners” sub-sample).**

Sample Descriptive Results

Country	Sample Size	Gender	Age Range	Ave. Age
Germany	524	50% male 50% female	18-97	46 yrs.
France	500	37% male 63% female	18-95	46 yrs.
U.K	584	45% male 55% female	18-87	43 yrs.
Italy	512	48% male 52% female	18-90	46 yrs.
Holland	509	42% male 58% female	18-93	45 yrs.

Total sample size = 2,629 respondents

Summary of Key Findings

- **Unaided Recall:** In terms of spontaneously naming “Utah” as a state in the American West, there were no differences between the results of the 1999 study and the 2002 study.
- **Aided Recall:** In both 1999 and 2002, 7 out of 10 European respondents recognized “Utah” when the state was mentioned as a state in the American West. While this is a high level of recognition, California, Colorado, and Arizona all had significantly higher levels of recognition.
- **Knowledge of Salt Lake City** as the host city of the 2002 Winter Olympic Games increased dramatically as a result of the Olympics, from 1 in 5 respondents in 1999 to 1 in 3 respondents in 2002.

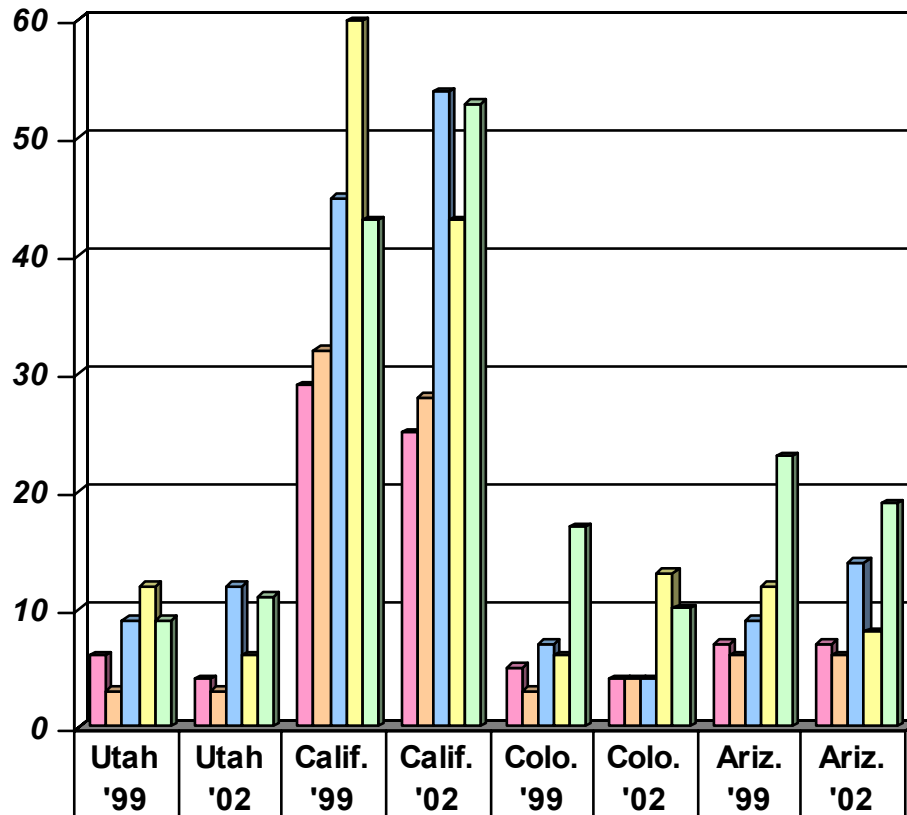
Summary of Key Findings (continued...2)

- **Knowledge of Utah as the host state of the 2002 Winter Olympic Games increased as a result of the Olympics, from 1 in 10 respondents in 1999 to 1 in 6 respondents in 2002.**
- **While the LDS Church remained the most frequently mentioned image of the State of Utah in both 1999 and 2002, Europeans' images of Utah's geography (mountains and desert) increased dramatically as a result of the Olympics.**

Summary of Key Findings (continued...3)

- **The 2002 Winter Olympic Games clearly has had a favorable impact on the State's tourism prospects:**
 - **Europeans' knowledge of the city of Salt Lake, and the State of Utah has increased dramatically between 1999 and 2002.**
 - **Those respondents who reported being most likely to visit the American West as their holiday destination within the next two years had the highest levels of awareness of Salt Lake City, and Utah in the entire sample.**
 - **Europeans who have visited the American West in the past two years have a much richer set of images of Utah, and report significantly higher intentions to visit Utah relative to respondents who have not been to the American West in the past two years.**

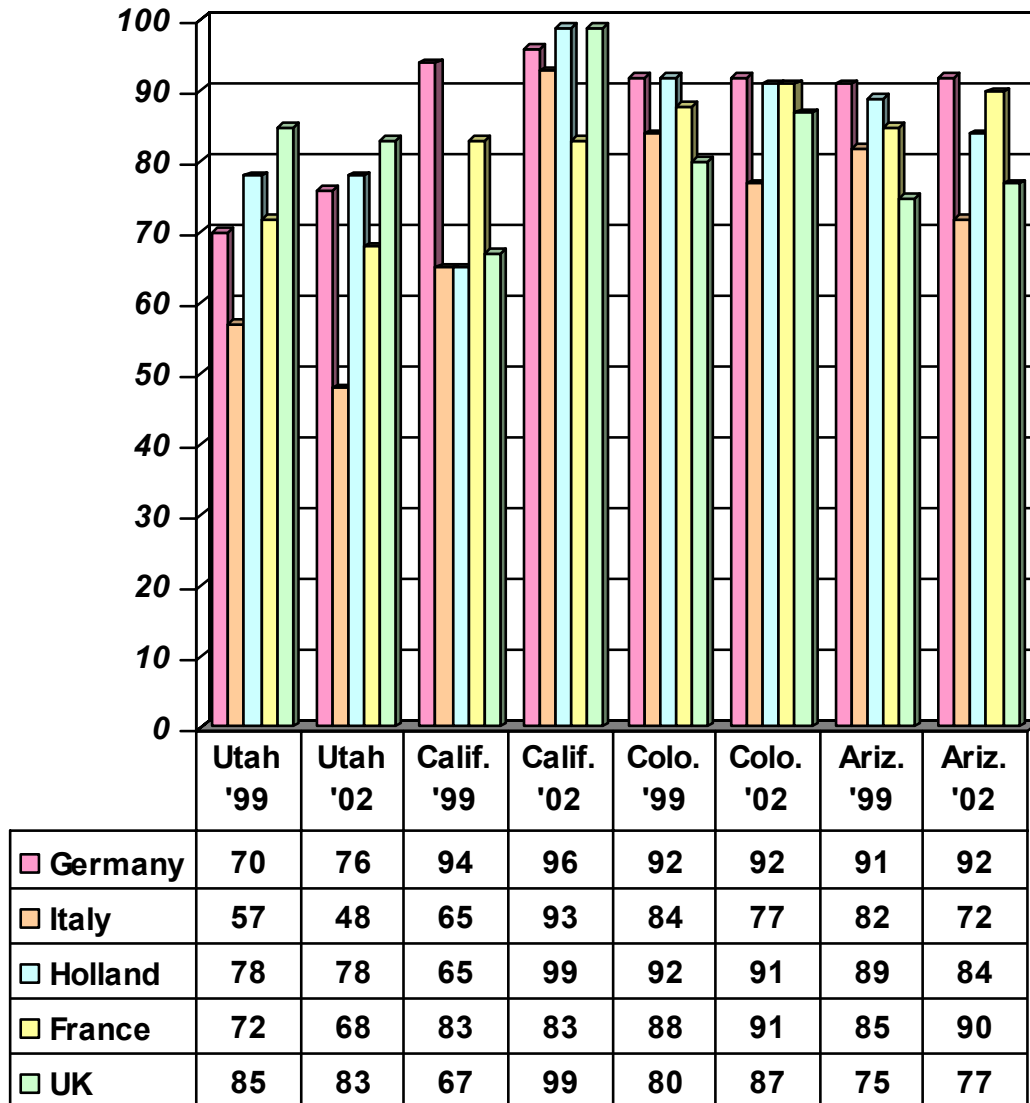
Unaided Recall



Given a $\pm 3\%$ sampling error, there are some differences in the rate of unaided recall for a few of the states between 1999 and 2002. This is not the case for Utah however.

- Percentage responding to question: *“What states come to mind when you think about the American West?”*
- Other states besides these 4 were mentioned, but Calif., Colo., and Az. are seen as Utah’s major competitors.

Aided Recall



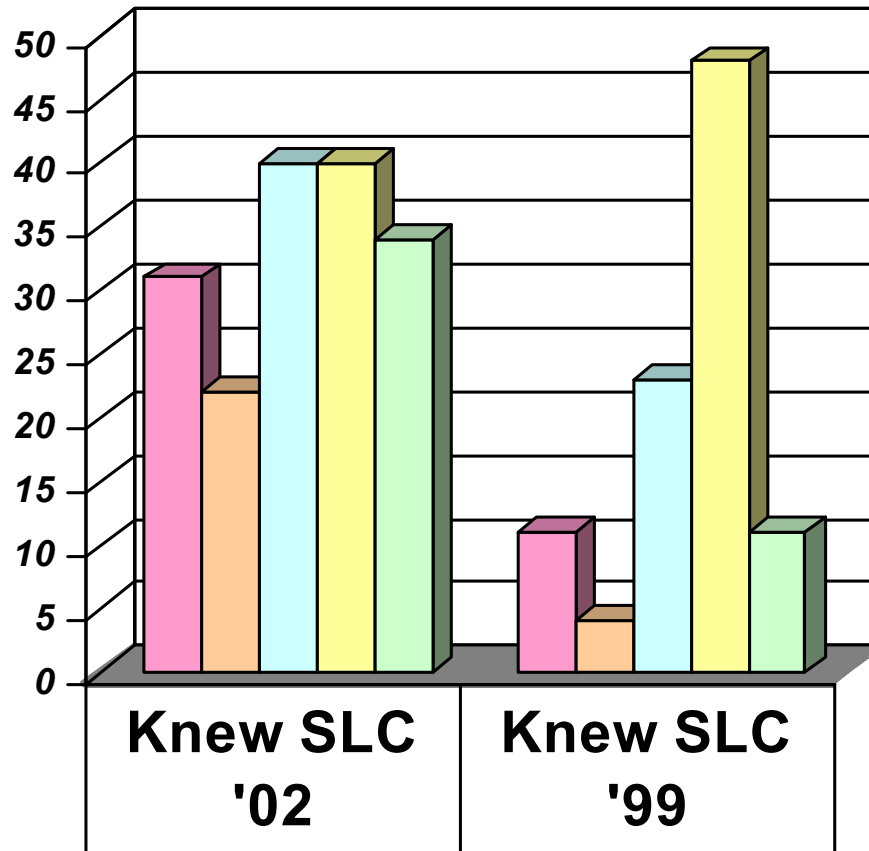
Given a +/- 3% sampling error, there are differences in the rate of aided recall for some of the states between 1999 and 2002.

However, for Utah, the rate remains largely unchanged between the two studies. On average, Utah has a lower rate of aided recall than the other states.

This finding is true of the 1999 study, as well as for the 2002 study.

- Percentage responding to question:
“Have you heard of the following other States?”

Host City Knowledge



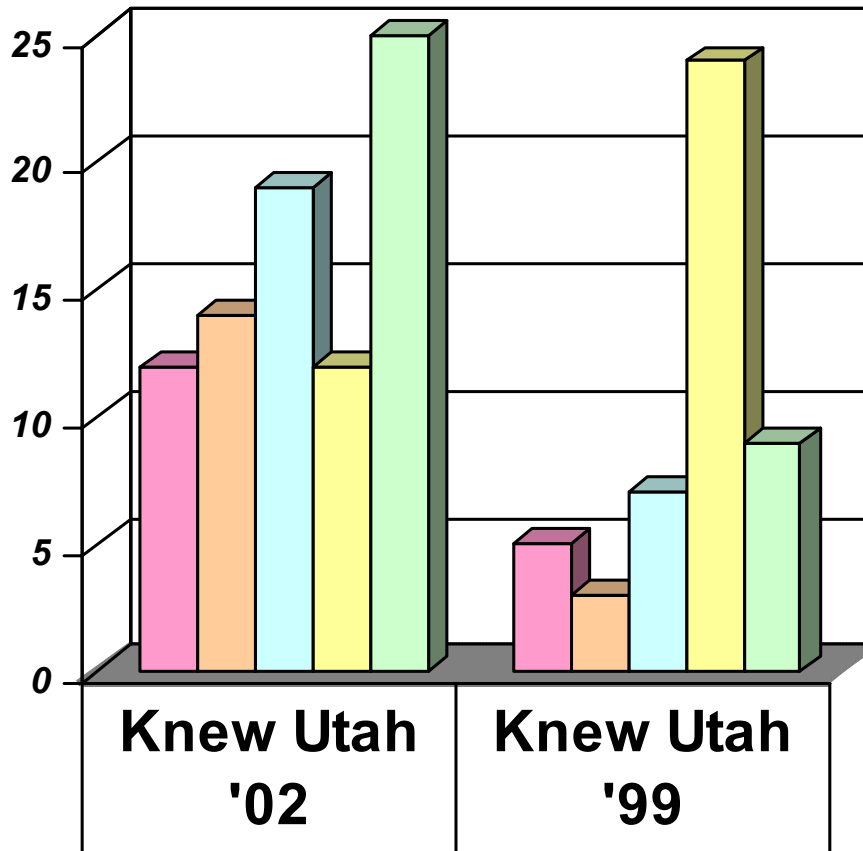
With the exception of the French respondents, there was a significant increase in knowledge of the Olympic City Host between 1999 (1 in 5) and 2002 (1 in 3).

Germany	31	11
Italy	22	4
Holland	40	23
France	40	48
UK	34	11

Percentage responding to the question:

“Do you know which city is hosting (1999)/has hosted (2002) the Winter Olympic Games in 2002?”

Host State Knowledge

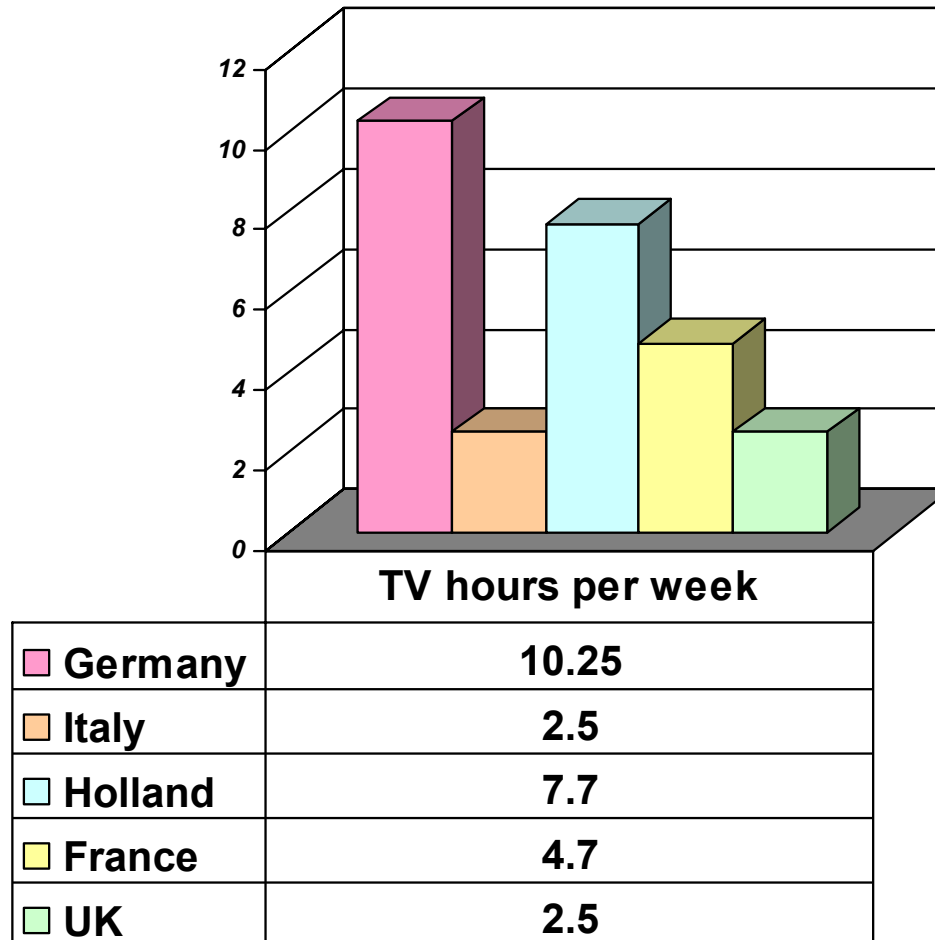


With the exception of the French respondents, there was a significant increase in knowledge of Utah as the Olympic Host State between 1999 (1 in 10) and 2002 (1 in 6). Note that awareness of Salt Lake City is significantly higher than awareness of the State of Utah.
(Slide 9 vs. Slide 10)

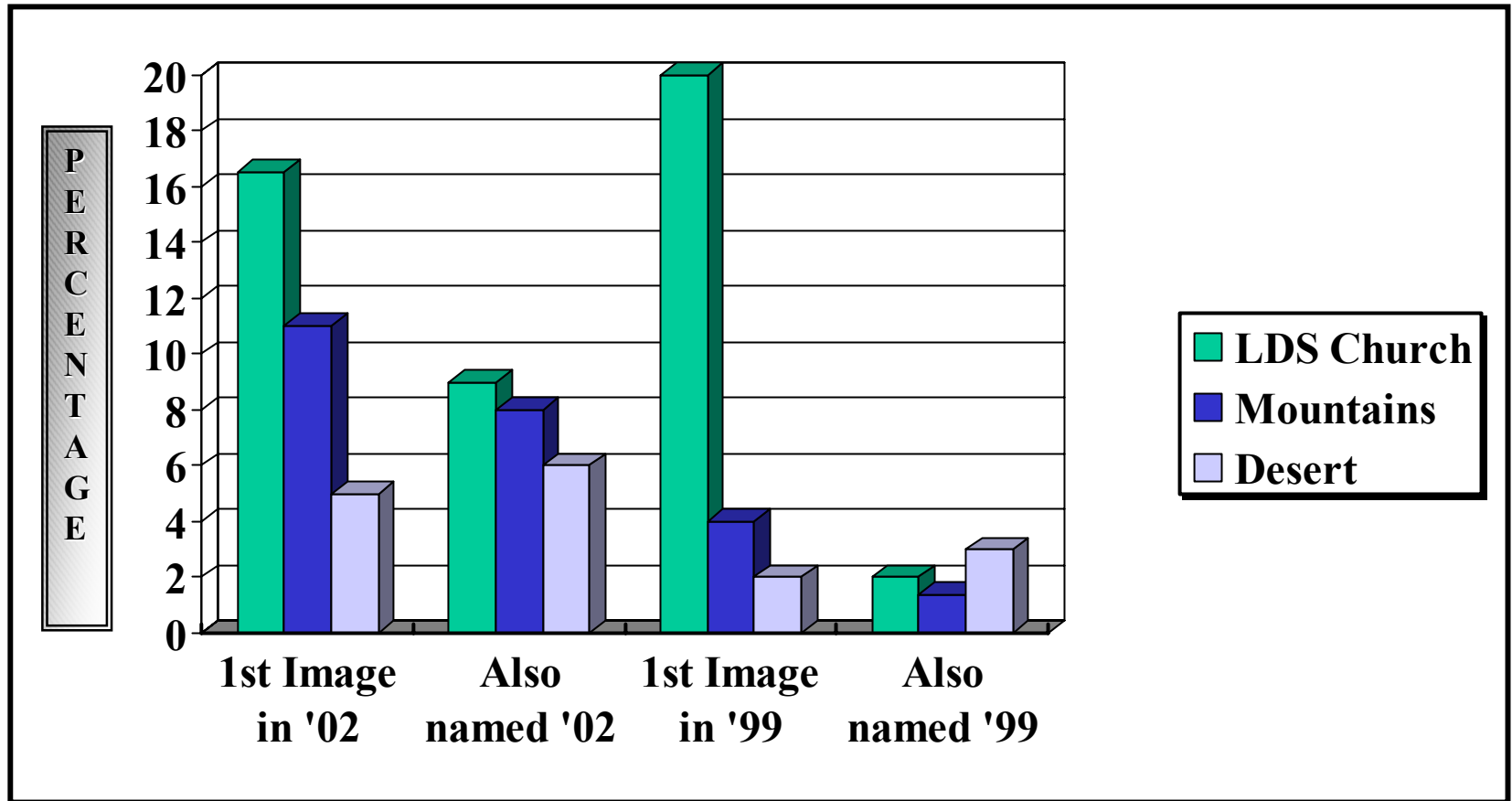
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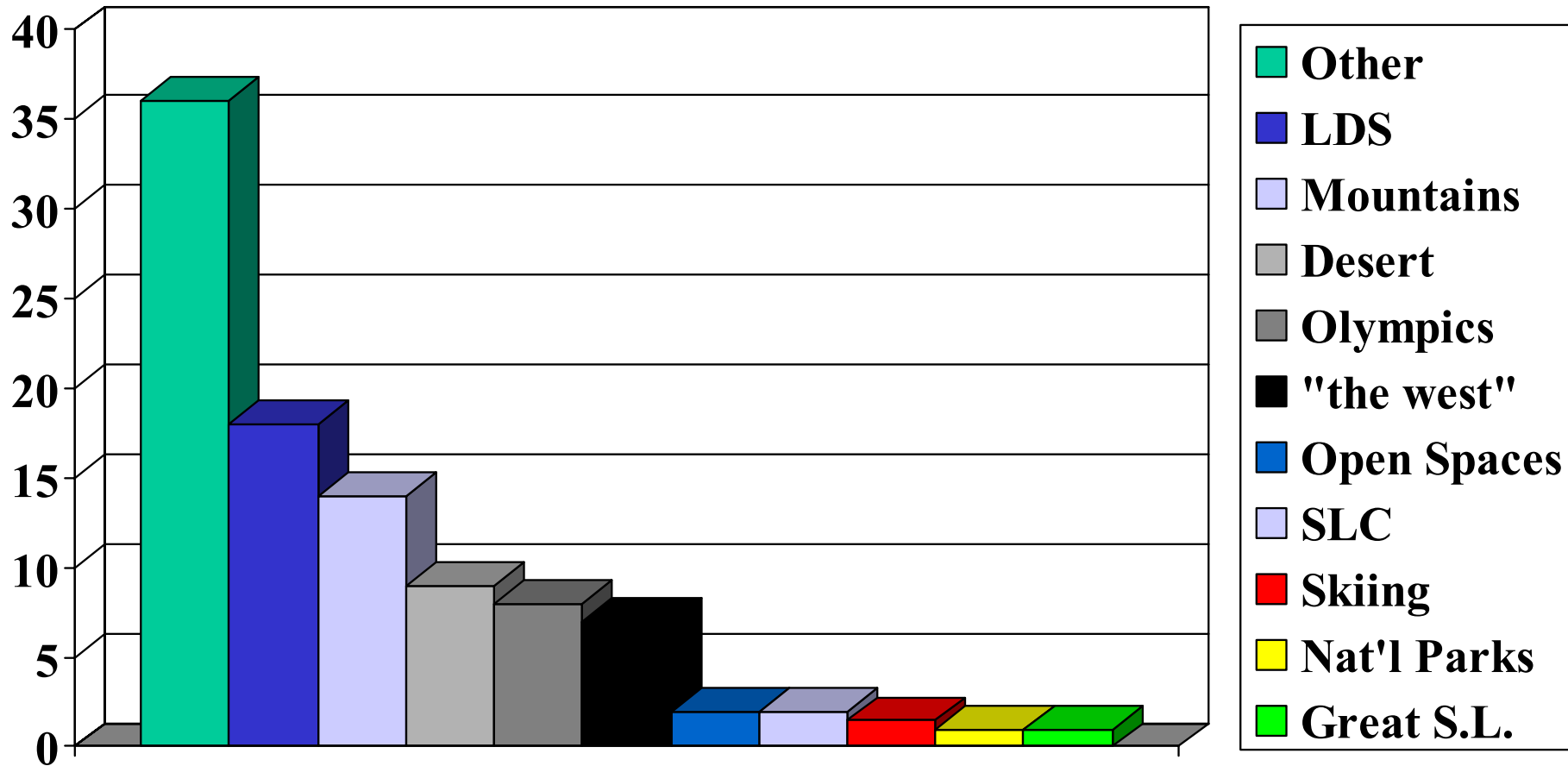
T.V. viewing per week during the 2002 Winter Olympic Games



What images come to mind when you think about the State of Utah?



If only one image...



629 respondents, or 24% of the total sample could only offer one image when asked the question:
“What images come to mind when you think of the State of Utah?”

A variety of “other” responses collectively make up the most common response (36%), followed by the naming of the following specific images, as shown above in the graph.

Previous studies by the Utah Travel Council have consistently shown that as part of the “interior” West, Utah is more likely to be a tourist destination on a European’s second visit to the American West. Of those respondents who reported having been to the American West in the past two years...

- Their reported intentions to visit Utah within the next two years are 1/3 greater than the intentions of those who have not visited the American West in the past two years.
- They watched on average 2 more hours of televised Olympic activities per week.
- They were able to offer twice as many unaided images of the State of Utah.

“Top-Liners” on intentions to visit Utah...

Respondents who scored in the top 15% on the multiple questions which measured intentions to visit the American West and the State of Utah in the next two years....

- Had an average age of 41, and were equally split on gender
- One out of two knew that Salt Lake City was the host city of the 2002 Winter Olympic Games (compared to 1 in 3 for the entire sample)
- One out of three knew that Utah was the host state of the 2002 Winter Olympic Games (compared to 1 in 6 for the entire sample)
- In spite of their contrary results between the 1999 study and the 2002 study, the French respondents made up 34% of the “top-liners (followed by the British at 27%).

